



Europa Media Trainings

# Getting your project started

***Ömer Ceylan***

*Managing Director, Geonardo*

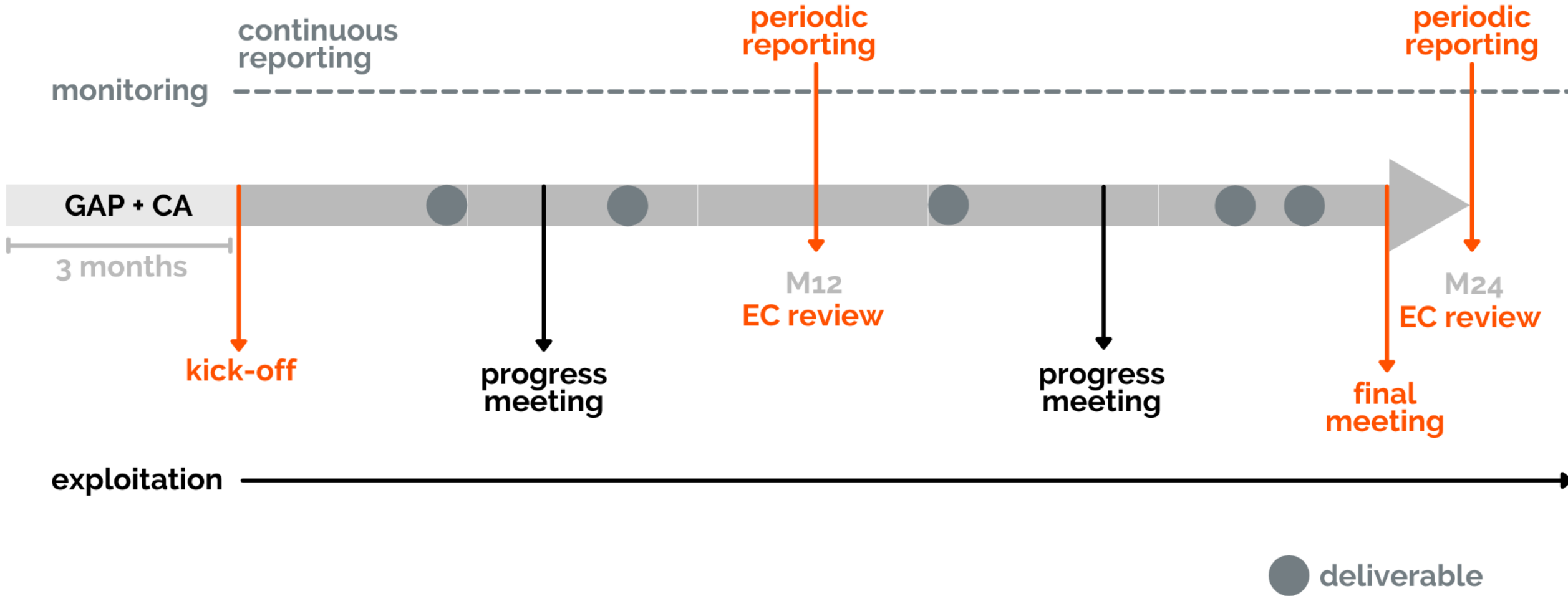
Horizon Europe Academy – The Fundamentals  
Prague, 1-3 March 2023

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# Zoom in: implementation

## Reality



# Grant Agreement

## What is a Grant Agreement?

= a legally binding framework for project implementation

- Signed between the beneficiaries and the European Commission or an Executive Agency of the EC
- Establishes the main rights & obligations of participants towards the European Commission
- **General Model Grant Agreement (V1.1, Apr 15, 2022)**
- **Annotated Model Grant Agreement (pre-draft, update Nov 30, 2021)**
- Clear structure, applicable to several EU funding programmes
- E-signatures



# Grant Agreement Preparation

- Process duration: 3 months max.
- Consortium must prepare input for the Grant Agreement (DoA)
- Further specifications to be considered, either from the EC or from your project's Ethics Review
- Grant Agreement signed between the EC and the Coordinator

## Documents to watch out for

- Invitation to Grant Agreement Preparation
- Declaration of Honor
- Accession Forms (signed by all other partners)

💡 Even if the project has not officially started yet, consider already these “pre-contractual efforts”.



# Grant Agreement Invitation letter



GEONARDO ENVIRONMENTAL  
TECHNOLOGIES LTD  
ZAHONY U 7  
1031 BUDAPEST  
HUNGARY

**Subject: Horizon Europe (HORIZON)**  
**Call: HORIZON-CL6-2021-GOVERNANCE-01**  
**Project:**  
**GAP invitation letter**

Dear Madam/Sir,

I am writing in connection with your proposal for the above-mentioned call.

Having completed the evaluation, we are pleased to inform you that your proposal has passed this phase and that we would now like to start **grant preparation**.

Please find enclosed the evaluation summary report (ESR) for your proposal.

## Invitation to grant preparation

Grant preparation will be based on the following:

1. **Project:**
2. **Topic:** HORIZON-CL6-2021-GOVERNANCE-01-10 — Raising awareness of circular and sustainable bioeconomy in support of Member States to develop bioeconomy strategies and/or action plans
3. **Type of action:** HORIZON Coordination and Support Actions
4. **Project officer:**  
Agri-Food promotion, Environmental Observation and Innovative Governance

⚠ Please always use the Funding & Tenders Portal messaging function (via your [Portal account](#)). Do NOT contact us via other means (email, letter, etc.) — unless explicitly asked to do so.

5. **Maximum grant amount:**

Requested EU contribution (according to proposal):

Maximum grant amount (proposed amount, after evaluation):

⚠ Please note that the proposed amount may still be lowered during grant preparation.

6. **Project duration:** 36 months

7. **Grant preparation:**

Preparation of grant data & annexes: 2 weeks after receiving this letter

⚠ The annexes (description of the action, estimated budget, etc.) must be based on the proposal you submitted and the clarifications provided (if any). You may normally NOT make changes to the project/project budget/consortium composition (except if required by us). Please immediately inform the project officer if you need to make a change (e.g. *bankruptcy*, etc.).

⚠ Please be aware that your proposal may still need to undergo an ethics review or security scrutiny (and the results will then have to be implemented by you).

Once we have checked the information you have encoded, you will have 2 weeks to submit your final version — to bring it in line with our comments.

Declaration of honour (DoH): 6 weeks after receiving this letter

⚠ Please note that each applicant should also submit a signed and scanned DoH for each one of their linked third parties.

Signature: within 3 months after receiving this letter (planned date)

⚠ Please note that repeated failure to respect deadlines during grant preparation may lead to the rejection of your proposal (or a consortium member). Lack of cooperation will be taken to mean that you are no longer interested.

8. **Funding & Tenders Portal**

Grant preparation (including signature) will be done exclusively through the Funding & Tenders Portal electronic exchange system (login via your [Portal account](#)). Do NOT contact us via other means (email, letter, etc.) — unless explicitly asked to do so.

Please be aware that linked third parties (if allowed) must be registered and validated as legal entities in the Portal [Participant Register](#). ⚠ Register them immediately, if not already done.

Please note that some of your legal and financial data in the Participant Register is read-only and can be updated only by a LEAR (via the Portal My Organisation(s) page). You will therefore be contacted soon to appoint a [LEAR](#) (unless you already have one).

9. **Other**

⚠ The results of the ethics review are already available on the Portal (My Projects). Please be aware that the results may require action *before* signature of the agreement.

ℹ For more information on grant preparation, *see the Online Manual*. You can refer to this document also for programmes other than H2020 since the procedures are very similar.

Please note that this letter does NOT constitute a **formal commitment for funding**. The final decision on your project will only be taken at a later stage, since it depends on the finalisation of grant preparation and further checks which we still need to make (*for instance, financial capacity, m-exclusion, etc.*).

For calls with a limited number of proposals to be funded: If a call can fund only a limited number of proposals, grant preparation may be moreover be stopped if other proposals move up in the ranking after a successful evaluation review and re-evaluation procedure.

# Grant Agreement Declaration of Honor

## DECLARATION OF HONOUR FOR BENEFICIARIES (DoH)

I, the undersigned:

- for natural persons: in my own name
- or
- for legal persons<sup>1</sup>: representing the following entity:

**GEONARDO ENVIRONMENTAL TECHNOLOGIESLTD**  
 ZAHONY U 7  
 BUDAPEST 1031  
 Hungary  
 VAT number .

hereby certify

that (subject to the additional declarations below):

- 1 — The **information** provided for action **is correct and complete.**
- 2 — The information concerning the legal status in the [Participant Register](#) for me/my organisation is correct and complete.
- 3 — I/my organisation commit to comply<sup>2</sup> with the **eligibility** criteria and all other conditions set out in the call for proposals — for the entire duration of the action.
- 4 — I/my organisation:
  - are committed to participate in the action
  - have stable and sufficient sources of funding to maintain the activity throughout the checking action and to provide any counterpart funding necessary
  - have or will have the necessary resources needed to implement the action
  - acknowledge to be fully responsible for my affiliated entities which participate in the action
  - for research actions: are committed to comply with the highest standards of ethical principles and research integrity and confirm that the work is free of plagiarism
  - for actions involving EU-classified information: acknowledge that any sensitive

<sup>1</sup> This includes 'entities without legal personality' under Article 197(2) of Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012 ('[EU Financial Regulation](#)') (OJ L 193, 30.7.2018, p. 1).

<sup>2</sup> 'Commit to comply' means complying now and for the duration of the grant.

information or material that qualifies as EU-classified information under Commission Decision [2015/444](#)<sup>3</sup> must be handled in accordance with specific rules and follow the instructions given by the EU

- for coordinators of multi-beneficiary actions: are committed to act as the coordinator for this action.

5 — For applicants from non-EU countries: I/my organisation

- undertake to comply with the obligations under the agreement and to:
  - respect general principles (including fundamental rights, values and ethical principles, environmental and labour standards, rules on classified information, intellectual property rights, visibility of funding and protection of personal data)
  - for the submission of financial certificates under the agreement: use qualified external auditors which are independent and comply with comparable standards as those set out in EU Directive 2006/43/EC
  - for controls under the agreement: allow for checks, reviews, audits and investigations (including on-the-spot checks, visits and inspections) by the granting authority, the European Anti-Fraud Office (OLAF), the European Prosecutor's Office (EPPO) and the European Court of Auditors (ECA) (and any persons mandated by them)
- and confirm that:
  - we can be subject to the jurisdiction of the Belgian courts.

6 — I/my organisation:

- are NOT subject to an **administrative sanction** (i.e. exclusion or financial penalty decision)<sup>4</sup>

I/my organisation (or persons with unlimited liability for debts):

- are NOT in one of the following **exclusion situations**<sup>5</sup>:
  - **bankrupt**, being wound up, having the affairs administered by the courts, entered into an arrangement with creditors, suspended business activities or subject to any other similar proceedings or procedures
  - in breach of **social security** or **tax** obligations

I/my organisation (or persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the action):


<sup>3</sup> See Commission Decision 2015/544/EU, Euratom of 13 March 2015 on the security rules for protecting EU classified information (OJ L 72, 17.3.2015, p. 53).

<sup>4</sup> See Article 136 [EU Financial Regulation](#).

<sup>5</sup> See Articles 136 and 141 [EU Financial Regulation](#).

# Grant Agreement Accession Form

Grant Agreement number:

 Associated with document Ref. .

## ANNEX 3

### ACCESSION FORM FOR BENEFICIARIES

PIC established in

**hereby agrees**

**to become beneficiary**

**in Agreement No** (‘the Agreement’)

**between** GEONARDO ENVIRONMENTAL TECHNOLOGIESLTD (GEO) **and the European Research Executive Agency (REA)** (‘EU executive agency’ or ‘granting authority’), under the powers delegated by the European Commission (‘European Commission’),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

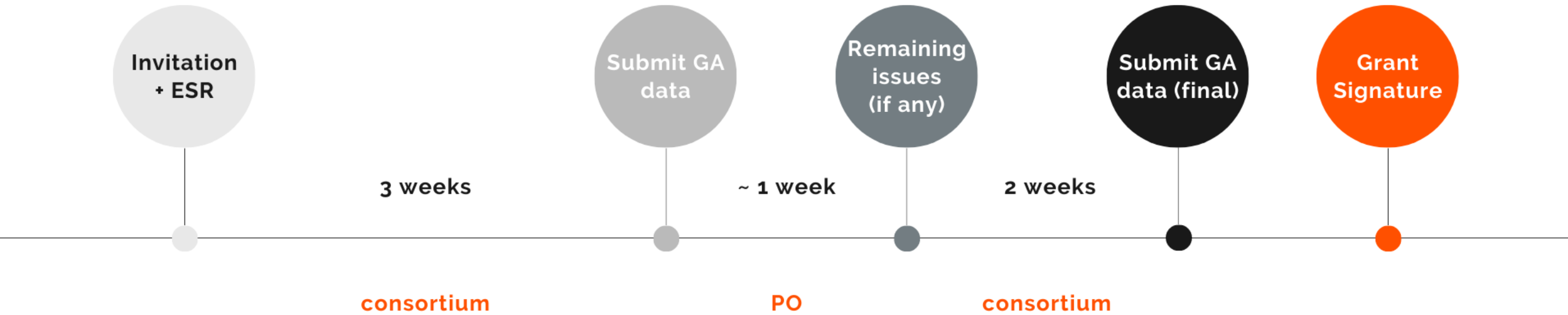
SIGNATURE

For the beneficiary

# Grant Agreement Preparation

## GAP TIMING

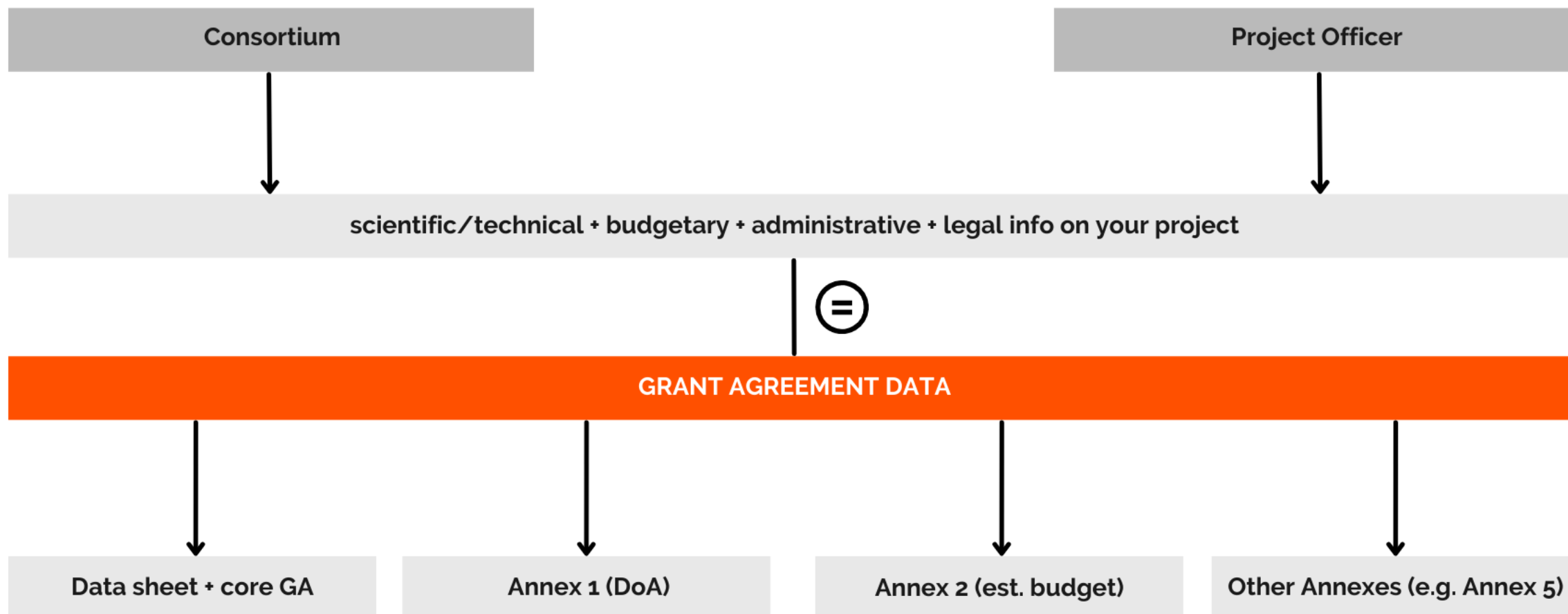
3 months max.





# Grant Agreement Preparation

## Structure of the Grant Agreement



# Grant Agreement Preparation

## Roles to consider

### Minimum configuration:

- 1 Legal Entity Authorized Representative (LEAR) per organization
- Primary Coordinator Contact (CoCo)
- 1 Participant Contact per beneficiary (PaCo)
- 1 Legal Signatory (LSIGN) per organization
- 1 Financial Signatory (FSIGN) per organization

💡 The LEAR has the right to appoint LSIGNs and FSIGNs.

💡 If the LSIGN and FSIGN are assigned to a specific project:

- LSIGN => PLSIGN (Project Legal Signatory)
- FSIGN => PFSIGN (Project Financial Signatory)



# Grant Agreement Preparation

## Who signs what?

### Declaration of Honor

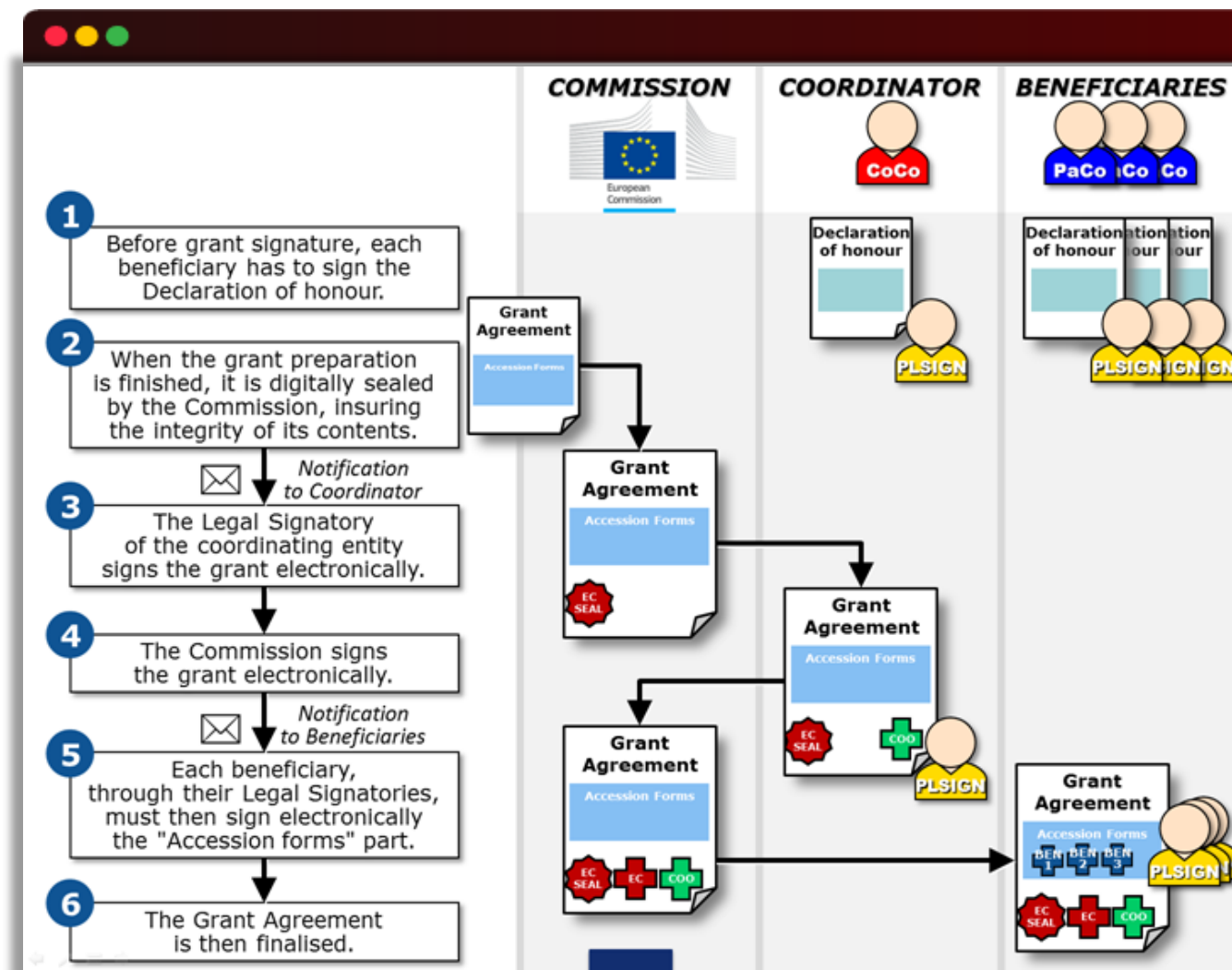
- The coordinator, enacted by the LSIGN
- Each beneficiary, enacted by the LSIGN

### Grant Agreement

- **Step 1:** coordinator signs the GA, represented by the LSIGN
- **Step 2:** EU/EC Agency signs the GA

### Accession Forms

- Each beneficiary, enacted by the LSIGN



# Consortium Agreement

## What is a Consortium Agreement?

- = legal agreement between Coordinator and partners
- = your guide on rules of the game
- Signed before Grant Agreement signature – obligation from Grant Agreement
- Mandatory for every project in H2020/Horizon Europe (unless otherwise specified)
- Refers to the internal organization, rights & obligations of the Consortium members towards each other
- **NEW Horizon Europe DESCA model**
  - [DESCA with elucidations](#)
  - [DESCA without elucidations](#)



# Consortium Agreement

## What to include?

- **Definitions**
- **Provisions on the governance of the Consortium:** governing bodies, meeting procedures, voting rules
- **Technical provisions:** tasks of each party, project schedule
- **Managerial provisions:** coordination & management, decision-making structure and processes, quality assurance
- **Financial provisions:** distribution of financial contribution, financial plan, budget modifications
- **Provisions on IPR and related issues:** dissemination, use & accessibility of results, confidentiality provisions, arrangements on settlement of disputes, liability



# Before Kick-off

## if you are a coordinator

- Get to know your **Project Officer (PO)**
  - Discuss expectations, potential issues
  - Invite them to the kick-off
- Inform your Consortium about the **date** ([Doodle](#))
- Draft the **agenda**, considering also specific sessions (workshop, brainstorming, site visit press conference)
- Follow up with a consortium **info pack** (agenda, templates, information on location, and social activities if planned...)
- **Get prepared**



# Before Kick-off

## if you are a partner

- Internal workshop with all involved team members at beneficiary level (project managers, communication managers...)
- Topics
  - The bigger picture: scope of the project, own objectives and interest in project results
  - Key tasks and processes to implement and roles of teams
  - Digging into details: plan the work for the next 6-12 months, set timelines, responsibilities, anything you need to start implementation

💡 **Recommended for partners:** keep calm & do your homework (read proposal, GA, CA...).

💡 **Recommended for partners (2):** keep calm & do NOT be surprised if you are asked to already prepare content & contribute at the kick-off meeting.

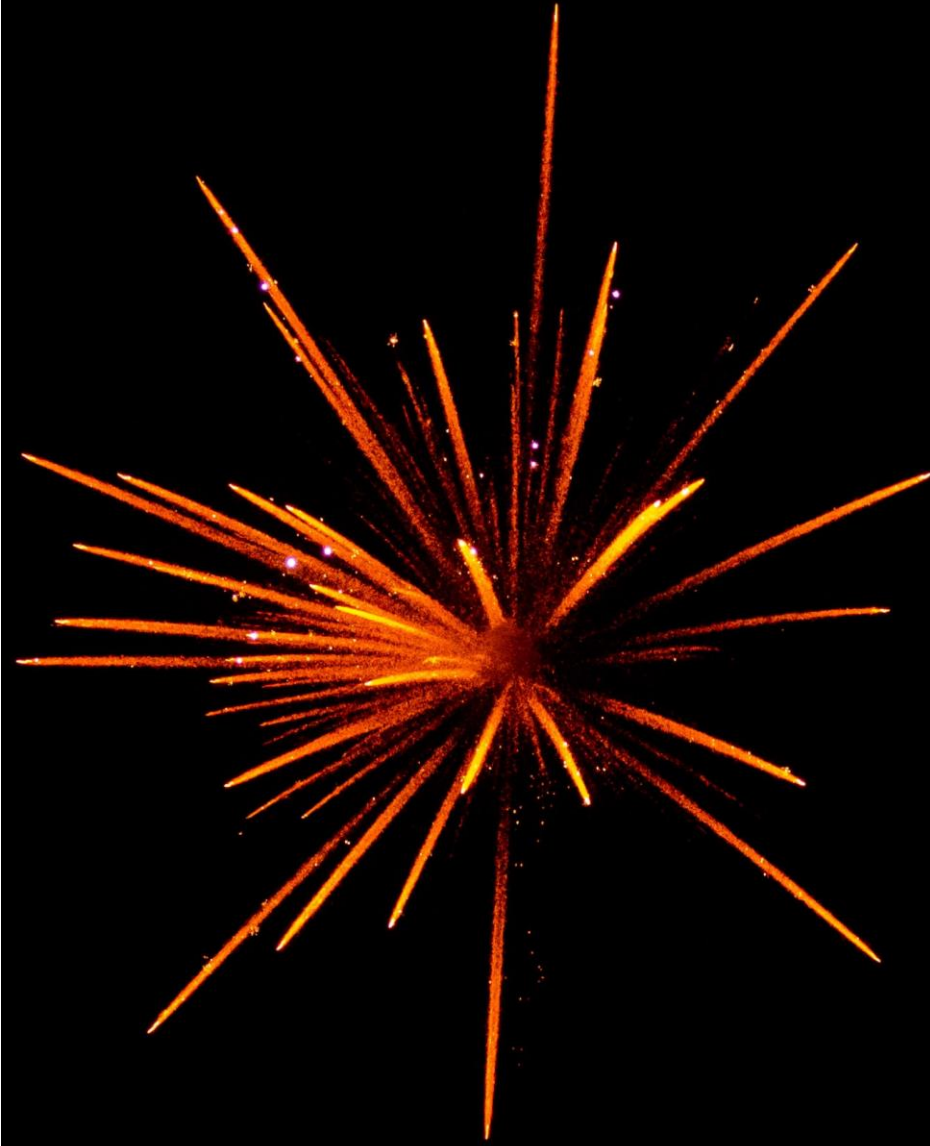


# D-Day: let's kick it off!

## Agenda

- Tour de table (intro of partner organizations)
- Project overview: overall objectives, foreseen activities & results, role of partners, expected outcomes...
- Activities per Work Package (WP) – by each WP leader
- Project Officer intervention
- Specific sessions
- Action plan for first 6 months (discussion & validation)
  - Activities per partner
  - Deadlines
  - Responsible partners
- Setting up the system
- Other: nominate and confirm governing bodies, e.g. the Steering Committee

💡 **Are your partners newcomers?** A short chat about basic rules on good implementation & financial management is recommended.





# Setting up the system

## Project management & coordination

- Introducing the system at the kick-off
- Internal communication
- Internal monitoring
- Tools & templates for effective management & communication
- Consortium Agreement already setting some guidelines on: internal reporting, governing bodies, decision making rules, ownership of results...

 **Internal technical report HE**

 **Internal financial report HE**

 **Dissemination report table HE**



# Project Management Platforms

To use or not to use?



- No copy-paste from different sheets, online system
- Comparisons & calculations made automatically
- Automatic deadline warnings
- Notifications on admin tasks programmed & sent automatically



- Expensive & might not save time for partners
- Different versions, overcomplication
- Seen as administrative burden
- Always need to check carefully data, bugs & mistakes if any

# Internal communication

## The tools & new reality

- File sharing: Google Drive? DropBox? SharePoint?
- Exchanging quick messages: Slack? Teams?
- Email lists?
  - Project email list
  - Work Package leaders email list
  - ...
- Calls: Skype? Teams? Zoom?
- Virtual project meetings (at least for now): Zoom? GoToMeeting?

💡 Count in the current circumstances – choosing the right tools or internal communication.



# Life after kick-off

## ⚙ Semestrial Action Plan

## ⚙ Meeting Minutes template

- A good kick-off meeting ends with a 6-month Action Plan
- Do not forget the meeting minutes & share presentations/templates/materials...
- Internal “protocols” test (make a change immediately if necessary)
- Team test: a team makes the dream work

<b>Title</b>	Empowering innovation intermediaries to generate sustainable initiatives to incentivise			
<b>Acronym</b>	InnORBIT			
<b>Start date</b>	1-Jan-2021			
<b>End date</b>	30-Jun-2023			
<b>Kick-off Meeting - Action List</b> 20th and 21st January 2021 (remotely - GoToMeeting)				
Action No	WHAT	WHO	WHEN	STATUS
1.01	Create and share a template for creating a list of stakeholders to be involved in various project activities (e.g., T1.1, T1.2, T1.3 as well as T3.3)	Q-PLAN	26-Jan-21	
1.02	Agree on the ecosystem countries to be mapped in Task 1.1	All partners	31-Jan-21	<b>DONE</b>
1.03	Produce and share with all involved partners the interview questionnaire, level matrix and country dossier templates to be used under Task 1.1	STP	31-Jan-21	
1.04	Provide contacts to be included in the interviews for Task 1.1 to STP	ALG, COR, ROS, SEN	1-Feb-21	
1.05	Draft the questionnaire required for the interviews of Task 1.2 and share with partners for feedback and comments	Q-PLAN	19-Feb-21	

## InnORBIT

*“Empowering innovation intermediaries to generate sustainable initiatives to incentivise and accelerate the commercialisation of space innovation”*

*GA Number*

### KICK-OFF MEETING MINUTES

20 - 21 January 2021  
Remote (GoToMeeting teleconference tool)



This project has received funding from the European Union's Horizon 2020 Research and Innovation Programme under Grant Agreement N° 101004212.

A white rectangular card is suspended from a thin, black and white braided string by a black clothespin. The card is centered horizontally and has the word "QUESTIONS?" printed in a bold, orange, sans-serif font. The background is a plain, light gray wall.

**QUESTIONS?**

Thank  
you

*for your attention*

Ömer Ceylan  
omer.ceylan@europamedia.org



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